1. Greeter:

Answers the phone, and determines, as quickly as possible, the following needs of the caller:

* TrackR or OHT Medical Imaging
* Does the caller have a Case Number? If so, then to Escalated Service, or a technician, if the Expert is not available.
* Technical Support, or Customer Service?
* Specific extension / person requested

The greeter is able to do this, now that Tracker is part of the duties, in less than 30 seconds for an experienced caller, and between 30 seconds and 2 minutes for a first time caller. The challenge is determining the need of the caller, without listening to the entire story. When the decision is made, the greeter puts the caller into the appropriate queue.

The greeters also monitor the single “external caller” voice mail box on a regular basis. They listen as quickly as possible to each message, and then route it to the appropriate internal voice mail box (TrackR support, Medical Imaging support, TrackR Customer Service or Medical Imaging Customer Service).

1. OHT Medical Imaging Technician (OHT MedTech)

After answering the call, the tech determines if this is a new caller, or a repeating caller, and gets a company and personal name. From the CRM, they locate the company and person, or set up the new contact record. They also determine if this is a first call for this issue for the caller. Then, the tech starts hearing the caller’s story / issues. After getting the general scope, the tech finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. Since 2010, about 81% of the time, the OHT Medtech is able to answer the caller’s question(s). This process takes 1.8 minutes, on average.

When call is done, the Medtech finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, but doesn’t want escalated service, then that is noted as well. Finalizing contact notes takes usually 1.5 minutes.

If caller needs escalated service, or wants to return or refund, or order more product, then the Medtech puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call. If escalated service is needed, the Med tech also opens a new Case in the CRM and links the notes as needed.

The CRM has a large Comments window (freeform RichText, like a Word Processing page that you don't need to save as a separate file) available for each contact name in the system. Support notes, specific to a "case", are kept in that window for the customer. Each note starts with the date and time, and the name of the person writing the note. To make things seem official, a number is created from the current date and time (ie Dec 8, 2017 at 12 noon would be 171208-1200). This is the Case Number given to the caller, if needed.

If the caller has a case number, then the Medtech will find the case notes in the CRM and review them quickly to see if an answer can be communicated. If an answer is there, then the Medtech gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the caller is put into the queue for escalated service, and the Medtech finalizes any contact notes, then goes ready for another call.

1. OHT Medical Imaging Expert (OHT Expert)

After answering the call, the Expert gets a company and personal name, or a case number. From the CRM, they locate the company and person. They read the notes, while having a general conversation with the caller. Then, the expert starts hearing the caller’s story / issues. After getting the general scope, the expert finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. Since 2010, about 96% of the time, the OHT Expert is able to answer the caller’s question(s). This process takes 4.5 minutes, on average.

If the caller has a case number, then the Expert will find the case notes in the CRM and review them quickly to see if an answer can be communicated. If an answer is there, then the Expert gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the Expert continues troubleshooting. Time for this activity is widely variable.

When call is done, the Expert finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to close cases, and communicate with other OHT staff.

If caller wants to return or refund, or order more product, then the Expert puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call.

The Expert also monitor the Medical Imagining Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies.

1. OHT Medical Sales / Marketing / Customer Service (CSR)

After answering the call, the CSR gets a personal name. They determine if the caller wants to place and order, follow up on an order, or have a marketing conversation about products and services. For a marketing conversation, reference material is consulted if needed. If the customer is satisfied with the verbal info, then the call is finished, on average in about 95 seconds. The CSR makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. These calls are few, because the OHT Marketing staff do most of the sales work for Medical Imaging sales.

The CSR may have to spent 1-3 minutes e-mailing out information as well, then goes ready for another call.

If an order must be amended or cancelled, then the CSR turns to the corporate Order Management system, and does what is needed. This is, on average, a 7-minute process, but can vary from 3 to 11 minutes.

If an new order is being placed, then the CSR turns to the corporate Order Management system, and does what is needed. This is, on average, a 2.7-minute process, as most sales of this type are for consumables for the Medical Imaging Equipment. The Shipping / Receiving department will get the notifications that they need from the corporate Order Mngt system.

For either action, the CSR makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. The CSR may have to spent 1-3 minutes e-mailing out information as well (this happens about 20% of the time), then goes ready for another call.

1. OHT Medical Tech CSR Manager (Refunds / Returns)

The CSR manager divides their time between supervising the call centre operations (85%) and handling Refunds / Returns (15%). Like everyone else, after answering the call, the manager gets a company and personal name. From the CRM, they locate the company and person. From the corporate Order Mngt System, they also locate the company’s active orders. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. The appropriate actions are taken in the Order Mngt System.

When call is done, the manager finalizes any contact notes, then returns to their work. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to communicate with other OHT staff.

The Manager also monitors the Medical Imagining Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies and procedures.

1. TrackR Technician (TrackR Tech)

After answering the call, the tech determines if this is a new caller, or a repeating caller, and gets a company and personal name. From the CRM, they locate the company and person, or set up the new contact record. They also determine if this is a first call for this issue for the caller. Then, the tech starts hearing the caller’s story / issues. After getting the general scope, the tech finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. Since early 2013, about 63% of the time, the Tracker Tech is able to answer the caller’s question(s). This process takes 5.5 minutes, on average.

When call is done, the TrackR tech finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied, but doesn’t want escalated service, then that is noted as well. Finalizing contact notes takes usually 1.5 minutes.

If caller needs escalated service, or wants to return or refund, or order more product, then the TrackR tech puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call. If escalated service is needed, the tech also opens a new Case in the CRM and links the notes as needed.

The CRM has a large Comments window (freeform RichText, like a Word Processing page that you don't need to save as a separate file) available for each contact name in the system. Support notes, specific to a "case", are kept in that window for the customer. Each note starts with the date and time, and the name of the person writing the note. To make things seem official, a number is created from the current date and time (ie Dec 8, 2017 at 12 noon would be 171208-1200). This is the Case Number given to the caller, if needed.

If the caller has a case number, then the tech will find the case notes in the CRM and review them quickly to see if an answer can be communicated. If an answer is there, then the Tech gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the caller is put into the queue for escalated service, and the Tech finalizes any contact notes, then goes ready for another call.

1. Tracker Expert

After answering the call, the expert gets a company and personal name, or a case number. From the CRM, they locate the company and person. They read the notes, while having a general conversation with the caller. Then, the expert starts hearing the caller’s story / issues. After getting the general scope, the expert finds the appropriate book or manual on their screen, or draws from their experience, to ask more detailed questions. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. Since 2013, about 84% of the time, the TrackR Expert is able to answer the caller’s question(s). This process takes 9.3 minutes, on average.

If the caller has a case number, then the Expert will find the case notes in the CRM and review them quickly to see if an answer can be communicated. If an answer is there, then the Expert gives the answer, and then discusses to see if the issue is solved. If the issue is not solved, then the Expert continues troubleshooting. Time for this activity is widely variable.

When call is done, the Expert finalizes any contact notes, then goes ready for another call. If the caller is unsatisfied (about 11% of the calls), then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to close cases, and communicate with other OHT staff.

If caller wants to return or refund, or order more product, then the Expert puts the caller into the appropriate queue, finalizes any contact notes, then goes ready for another call.

The Expert also monitor the TrackR Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies.

1. TrackR Sales / Marketing / Customer Service (CSR)

After answering the call, the CSR gets a personal name. They determine if the caller wants to place and order, follow up on an order, or have a marketing conversation about products and services. For a marketing conversation, reference material is consulted if needed. If the customer is satisfied with the verbal info, then the call is finished, on average in about 3.7 minutes. The CSR makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. In 2014, there were many calls like this (64%), but in 2015 fewer people are calling to inquire (29%).

The CSR may have to spent 1-3 minutes e-mailing out information as well, then goes ready for another call.

If an order must be amended or cancelled, then the CSR turns to the corporate Order Management system and does what is needed. This is, on average, a 7-minute process, but can vary from 3 to 11 minutes.

If an new order is being placed, then the CSR turns to the corporate Order Management system, and does what is needed. This is, on average, a 2.7-minute process. The Shipping / Receiving department will get the notifications that they need from the corporate Order Mngt system.

For either action, the CSR makes a quick note (taking 22 seconds) on an informal tracking spreadsheet. The CSR may have to spent 1-3 minutes e-mailing out information as well (this happens about 20% of the time), then goes ready for another call.

1. TrackR CSR Manager (Refunds / Returns)

The CSR manager divides their time between supervising the call centre operations (45%) and handling Refunds / Returns (55%). Like everyone else, after answering the call, the manager gets a company and personal name. From the CRM, they locate the company and person. From the corporate Order Mngt System, they also locate the company’s active orders. Notes are taken during the call, if appropriate. It is important to clarify and confirm the caller’s perceptions and communications. The appropriate actions are taken in the Order Mngt System. The average time for a return or refund is 5.5 minutes.

When call is done, the manager finalizes any contact notes, then returns to their work. If the caller is unsatisfied, then that is noted as well. Finalizing contact notes takes usually 2.5 minutes, because there often is a need to communicate with other OHT staff.

The Manager also monitors the TrackR Support voice mail box on a regular basis. They then respond as appropriate to the message, following company policies and procedures.

1. IT Support staff

There is always a technology support person available to the Call Centre operations, since the staffing expansion in January 2013. They deal with hardware, network and software issues as needed. During the two 8 hour shifts per day, 5 days a week, and 1 shift on Saturday, the network is up 99.5% of the time (over one year). The PBX has the same uptime percentage. Two empty work stations are kept, so that, if a computer fails, the staff person just moves to another station. The corporate Order Management System has been struggling a bit in 2015 and is up about 97% of the time. The CRM is up 98.3% of the time.

1. Important notes

The Hold queues in the PBX have different listening content. Waiting for service? Listen to gentle advertising. Waiting for escalated service? Relaxing Music. Waiting for Marketing? Stronger advertising. Waiting for a Refund / return? Calming Music, with voiceovers with re-assuring messages.

The IT tech is responsible for monitoring the Hold Queues’ audio content.

Revisions:

Dec 8, 2017 – Add paragraph on the CRM Comments window and Case Numbering technique.

Feb 17, 2019 – All voice mailbox paragraphs